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by

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**Social Networking Sites: A Comparison Across the United States, Japan
and China**

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Report

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Social Networking Sites: A Comparison Across the United States, Japan and China

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Social media have been growing rapidly in recent years thanks to the innovations of social networking sites (SNS) such as Facebook and Twitter, both of which originated in the United States. Currently, SNS and other social media have become global phenomena. This report aims to study the features of SNS that prosper in the U.S., Japan, and China. Through a comparative analysis of the similarities and differences among the top SNS players in each of the three countries, it is possible to identify unique characteristics of each nation's social networking landscape. The SNS market in the U.S. is relatively mature, while the social networking population is growing in Japan and China. However, contrary to the expectations of some, the Japanese and Chinese social networking landscapes appear to be quite different from one another with regard to SNS usage, despite Japan and China's similar cultural backgrounds and geographical proximity.

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Introduction

With the use of the Internet and technology such as smartphones on the rise worldwide, social media have developed into important channels through which people can get news, show photos, share information, communicate with friends, and pose questions for help. If a young man says that he is surfing the Internet, then he is likely browsing social media or social networks. As many reports indicate, it is not only young people who are addicted to social media; older people are similarly drawn to social media, especially in the U.S. 54% of American people aged 45-54 have a SNS profile and 46% for those aged 55-64, according to Mintel. Due to a rapidly growing user base and great popularity during recent years, social media have also gained increasing attention in the fields of marketing, advertising, and even government communication. During the global recession, social media are becoming more and more popular as a discussion topic, and the benefits and applications of social media have become the hottest issues in a number of fields.

The global phenomenon of social media has been driven by the rapid development of SNS. The fast innovation and global popularity of this type of social media have been instrumental in fueling the social media market in the past several years. The U.S. is the leader of SNS innovations and applications due to its early development of social networks. With the adoption and implementation of SNS around the globe, SNS

players, as well as brand marketers, experience growing attention in foreign SNS user markets—in particular, in emerging Asian countries such as Japan and China.

Dell provides an interesting example of how SNS can be used in globalization. Dell created Twitter handles based on regional markets, such as “@DellConsumer_JP” and “@DellhomeUK.” In China, Dell has accounts on popular Chinese SNS like Renren and Kaixin001. Today, business branding and marketing must be social, because consumers around the globe have gathered on SNS.

The SNS based in the U.S., such as Facebook and Twitter, are well known worldwide. However, they are just gaining traction in Japan and China, where the local SNS still dominate the market. The marketability of SNS is chiefly related to the Internet market, and China, the U.S., and Japan are the top three Internet markets based on number of users (eMarketer, 2010). SNS market growth largely depends on the number of available Internet users; thus, these three countries have great potential in the SNS market that includes both global and local brands. With the increasing importance of social media marketing in integrated advertising and marketing strategies, it is imperative for marketers to understand the demographic profiles of SNS users, their usage habits, and the competitive landscape among the three markets. Using such data, brands can more effectively post brand and product information directly on SNS, initiate relevant social events to promote conversation between brands and consumers, and eventually increase brand visibility on SNS and search engine results. More importantly, with a

thorough understanding of the similarities and differences of SNS user bases, marketers can better plan strategies and marketing tactics.

Therefore, this comparative analysis of the three markets has more significant implications for SNS players such as Facebook and Mixi, both of which are seeking strategic entry points in foreign markets. Furthermore, the analysis provides additional insights for those marketers working on global social media marketing strategies, as well as integrating social media marketing into their marketing strategies. For example, SNS have proven excellent for promoting events and gaining customer support. Accordingly, SNS can evolve with regard to their brand messages, the applications they offer, and even what languages they use in different countries. This analysis will also prove useful as a reference for observing other SNS market entry strategies, such as have been used in Malaysia and Australia.

Definition and Classifications of Social Media

The term “social media” was coined after LinkedIn created its social network application in 2004 (Kaplan & Haenlein, 2010). It refers to a group of Internet-based applications that build on the technological foundations of Web 2.0 and allow the creation and exchange of user-generated content (Kaplan & Haenlein, 2010). From this definition we can understand that individual users all become content producers who occupy the primary role of communicating and information sharing on social media. User-oriented two-way communication is also a key characteristic of social media, in contrast to the one way communication style of traditional media.

Social media is an umbrella that represents many different forms of participatory interactive communication channels: some are conversations, some are networks, and some are game worlds. There are many different classifications on social media. Based on the concepts of social presence and self-presentation (Kaplan & Haenlein, 2010), social media has been divided into the following six different types (See Table 1): collaborative projects, blogs and microblogs, content communities, social networking sites¹, virtual game worlds and virtual communities. Another type mentioned by other scholars is a website which solicits answers to unusual questions.

¹ A social networking site is a website where individuals can set up an online profile, describing his or her interests, and add links to other profiles. Generally, users are able to post personal information, including photographs, videos, and blog entries.

Table1: Classifications of Social Media (Kaplan & Haenlein, 2010)

Types	Examples
Collaborative projects	Wikipedia, Google Reader
Blogs and microblogs	Twitter
Content communities	YouTube
Social networking sites	Facebook, LinkedIn
Virtual game worlds	World of Warcraft
Virtual social world	Second Life
Q&A Websites	Google Answers

General Overview of Social Networking Sites around the World

Social media has been a worldwide phenomenon and it is driven by fast growth of SNS over recent years. Universal McCann report shows that 62.5% of Internet users worldwide have created a social network profile. People around the globe have an increasing interest in signing up SNS, but most of them just read news, watch videos and see their friends' uploads, rather than publish their own blog or upload the videos they created, in particular since 2009.

According to Forrester's report, one of big trends in the global social media market is that social networking is growing. Many countries such as the US, Germany, UK, China, Japan and Australia have seen increases in SNS users, and SNS joiners² in Europe, metropolitan China, and Australia are growing at a double-digit rate, 11%, 18% and 11% respectively, in 2010 (Anderson & Bernoff, 2010). However, SNS user groups have different rates of change. More and more "spectators"³ appear in many countries. Finally, SNS content creation is limited by the slow growth in creators⁴ since this group provides little in the way of fresh ideas, content, and perspectives (Anderson & Bernoff, 2010). Only 10% of users who watch online videos upload videos to video-viewing sites.

² Joiner: people who join social networks or maintain profiles on social networking sites

³ Spectator: people who read blogs, listen to podcasts, watch videos from other users, read online forums, and read customer rating/reviews

⁴ Creator: people who publish a blog, publish their own web pages, upload video/music they created, write articles/stories and post them

The US is the leading market thanks to the early development of social networks such as Facebook and Twitter and the wide adoption by individuals and businesses worldwide. However, some emerging social media markets are growing rapidly outside of the US, especially in Japan and China. According to comScore, China, the US and Japan are top three countries in Internet usage in 2009, therefore they are likely to be the top markets in SNS usage worldwide. In the following section, the three markets and their respective SNS will be discussed in detail.

Social Networking Sites in the US

1. The Overview of US SNS Users

The United States is the second largest market based on the number of Internet users, according to comScore. Internet World Stats in 2010 shows that there were 220 million American Internet users in 2008, and the number is estimated to improve to more than 239 million in 2010, or 77% of the total population.

In terms of SNS users, 61% of US Internet users had a social network profile in 2009, compared with 41% in 2008 (Mintel, 2010). Mintel estimated that in 2009 there were 248 million unique visitors⁵ to the top eight SNS (see Table 2) in the US (Mintel, 2010), which represents a 41% increase over January 2009 (Mintel, 2010). However, eMarketer estimated that 88 million active social networkers visited SNS at least once a month in 2009. This number is expected to grow to about 115 million or 52 percent of Internet users by 2013 (eMarketer, 2009).

SNS are always accessed on a PC, so PC access is extremely important to the social network market. Home ownership of PCs has risen to 72% in the US in Spring 2009, up from 66% in 2007 (Mintel, 2010). Currently, smartphone access has also become another key factor in driving the SNS market. The US household penetration for

⁵ According to IFABC Global Web Standards, a unique user (UU) is "An IP address" plus a further identifier. The term "unique visitor" may be used instead of "unique user" with the same meaning. It is a common measurement of the popularity of a website, and it's just an identifier of a computer, not a person.

smartphone was 27% in July 2009, compared with 8% in July 2007. 25% of cellphone users had accessed the Internet through cellphones, compared with 7% in 2007 (Mintel, 2010).

Table 2 : Unique visitors to SNS, January 2009 vs. December 2009 (Mintel, 2010)

	January 2009 (000)	December 2009 (000)	% change
Facebook	68,558	132,130	92.7
MySpace	58,556	49,327	-15.8
Twitter	5,979	22,808	281.5
LinkedIn	11,274	14,879	32.0
Ning	5,674	5,828	2.7
LiveJournal	4,721	4,224	-10.5
Tagged	4,449	3,675	-17.4
Classmates	17,297	15,263	-11.8

Social networking remains an activity with a strong skew towards young adults (Mintel, 2010). In the US, 86% of 18-24 year olds have a social network profile, followed by 77% of 25- 34 and 68% of 35-44. The interesting thing is the 55-64 segment and those over 65 years old are the fast-growing age groups on SNS. Users with high household income exceeding \$100K are more likely to use SNS, especially Facebook, Twitter and LinkedIn (Mintel, 2010). The top three social media activities among the US users include managing a social network profile, uploading photos and uploading videos.

2. Big SNS Players in the US

Table 2 reveals that only Facebook, Twitter and LinkedIn kept increasing user bases in 2009. In fact, these sites are the most popular SNS being used and discussed by both individuals and businesses. All others saw a decline. Although Myspace still owns a substantial market share, it has decreased during recent years due to poor site design and a lack of new innovation. Another reason for the loss of users stems from Myspace pushing advertising too strongly; the whole site often came across as a site of unorganized advertisements (James, 2009). Even though it repositioned itself as a music social site for the niche market, it seems to have shown no improvements.

Facebook

Facebook was launched in February 2004, operating and privately owned by Facebook, Inc (Wikipedia , 2010). Originally called thefacebook, it was founded by former-Harvard student Mark Zuckerberg (Veloso, 2006) and primarily focused on high school to college students. Facebook has been the top SNS by a large margin in the US, and is also widely adopted in different countries, such as the UK, Australia, France, Germany, Japan, Mexico, Brazil, Indonesia, and Singapore.

To use Facebook, one must create an account first on the site, which is free (Jain, 2010). It requires the person to be at least 13 years old and have a valid email address. After entering personal details, your Facebook profile is generated (see Figure 1). Facebook users can: 1) search other users and add them as friends, or invite your friends on the email list to join in; 2) exchange messages privately or publicly, individually or

with the group; 3) join the groups where people have common interest (Wikipedia , 2010); 4) like business pages for getting the information; 5) post photos or videos, and tag your friends in it; 6) chat online instantly and so on. Facebook also has many applications such as playing games, sending digital gifts, taking polls, asking a question, and combining other social media.

Figure 1: Facebook Profile Page



Unlike Myspace, where people always use nicknames, using one's real name and background information promotes user trust on Facebook and people tend to contact their "real" friends on SNS. Second, improved privacy drives Facebook as a leader. Facebook makes it harder for unknowns to find each other. If a person wants to look for friends, he must know that individual's full name or email address, and get his permission if he sets up the requirement which is not necessary on Myspace. Third, less and more organized advertising gives Facebook a good reputation. Also, advertisements on the profile page are small and highly related to the user's location and interests. Furthermore, Facebook's

layout is functional, simple, and easy to use even for older people who may be less technically savvy. Finally, Facebook is productive in its new functions and applications (Robertson, 2009).

For the above reasons, Facebook is highly popular and has kept up its fast growth. In March 2010 it reached an 'important milestone' in the Internet according to Hitwise Intelligence, as the popular social networking site edged Google to grab its lead as the most visited site in the USA (Reyes, 2010). In July 2010, there were over 500 million Facebook users worldwide. Currently, in the US, it has 144 million users and has over 50% market share among SNS (Morejon, 2010).

According to Mintel's report in 2009, women are more likely than men to visit Facebook weekly to keep up with friends, 87% versus 80% respectively. Compared with Twitter and LinkedIn, Facebook is the most evenly distributed across age groups from 18 years old to over 64 (see Table 3). Among each age group, 78-89% of SNS users visit Facebook weekly (Mintel, 2010). Those aged 35-44 are the most popular group, followed by 55-64 and those 45-54 years old. This might be largely due to the easy-to-use interface and the network among people you know in real life. Finally, Facebook users have higher income than Twitter and LinkedIn users. 89% of SNS users with over \$100K household income use Facebook, compared with 24% for Twitter and 22% for LinkedIn.

Table3: Facebook, Twitter and LinkedIn usage on a weekly basis, by age, November 2009

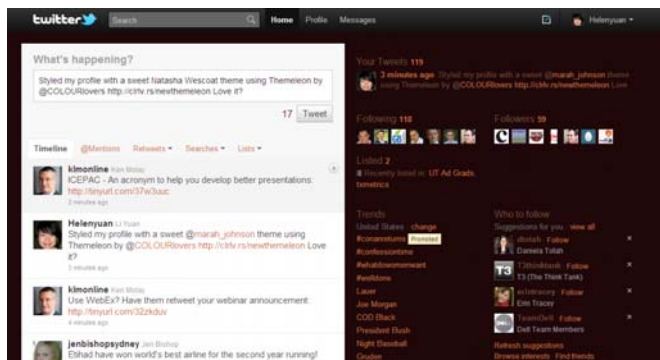
	All	18-24	25-34	35-44	45-54	55-64	65+
Facebook	84%	79%	82%	89%	85%	87%	78%
Twitter	19%	21%	25%	20%	15%	9%	9%
LinkedIn	10%	5%	14%	14%	12%	10%	5%

Base: 1106 US adults (18+) with Internet access who have at least five friends on an SNS

Twitter

Twitter was founded in 2006 by Jack Dorsey. Although it was two years after Facebook, Twitter has gained popularity in the US and other foreign countries such as Singapore, Malaysia and Thailand. Twitter offers free social networking and micro-blogging services, that is, it is a platform that allows you post and read other users' messages called "tweets" (Wikipedia, 2010). The main difference with other social networks is that Twitter users can post short, 140-character at most updates on what they are doing. Users can follow each other to receive the update of tweets.

Figure 2: Twitter Profile Page

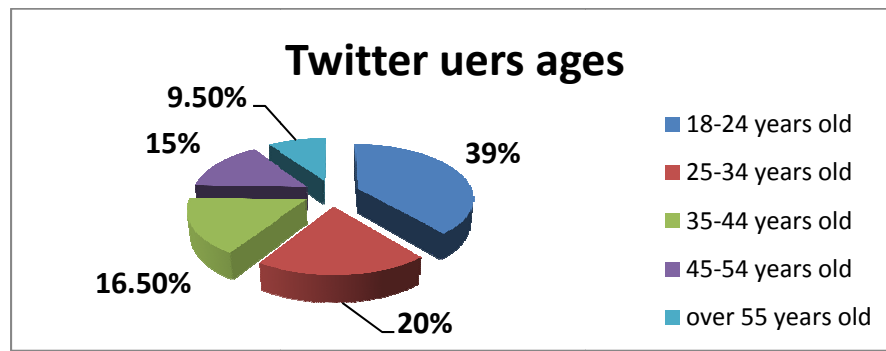


Twitter has been booming, with a growth rate of over 280% exclusively in 2009. Compared with Facebook where people can only communicate directly if both have agreed to be “friends”, Twitter is a kind of platform where people can follow anyone they want without his or her permission. So, Twitter users are more likely to follow celebrities and experts, not friends. Second, thanks to the limited character message requirement, Twitter promotes quick responses and feedbacks. This is why more business users prefer using Twitter as one important channel for their customer support. Third, Twitter is also quite easy to use and even easier to understand than Facebook. Users can access Twitter account through various other channels like desktop and mobile. For example, if users like to see things in one simple application, the popular tools like TweetDeck or Seesmic are available to use from the desktop computer. If they like to use Twitter while being on the go, they can use applications such as Tweetie and iPhone. This is also why more smartphone users are receptive to Twitter.

Due to the reasons above, Twitter’s traffic has grown tremendously in the past year. There are more than 175 million registered users as of September 2010 according to Twitter (Twitter, 2010). Quantcast estimates that Twitter has 54 million monthly unique visitors in the US. Also, Twitter targets different market users. Its users are young adults in big cities, slightly more female than male, and likely to visit pop culture websites (Thomases, 2010). Hitwise estimated those aged 18-24 years old take the lead among Twitter users with 39% (see Figure 3), followed by users aged 25-34 and 35-44

(Thomases, 2010). Sysomos study found that New York has the most Twitter users, followed by Los Angeles, Toronto, San Francisco, and Boston (Thomases, 2010). According to the study in July 2009, if Twitter is some one's favorite site, he or she is more likely to be interested in sex than the average Facebook, or LinkedIn user (Thomases, 2010).

Figure 3: Twitter Users Age Attribution (Thomases, 2010)



eMarketer estimated that most visitors, about 66%, contact their friends primarily on Twitter, especially for the group under 35 years old. Also, compared with males, more than 14% of females are likely to do so. On the other hand, a Harvard Business School study showed that the most prolific 10% of tweets accounted for 90% of tweets, compared to other SNS where the most active 10% account for 30% of content. Those active 10% of Twitters represent the opinion leaders and product innovators.

LinkedIn

LinkedIn is a business-oriented social networking site (Wikipedia, 2010). It was

launched in May 2003 and mainly used for professional networking. LinkedIn is the No.39 of the top 50 US sites ranking (Quantcast, 2010).

LinkedIn users create profiles to sum up their professional achievements (see Figure 4). This enhances visibility to friends, classmates, prospective clients, current and previous colleagues, employers, and possible business partners. People can invite trusted contacts to connect each other. Companies, in turn, are increasingly turning to LinkedIn as a way to find potential management candidates rather than utilizing headhunters. Fee-based premium memberships allow employers to search for key words regarding required qualifications, recommendations from colleagues, and more. The users also can join groups where people have same interests to communicate with other group members. Recently, LinkedIn increased cooperation with Twitter. When a user posts a message on Twitter, it can be showed on LinkedIn at the same time.

Figure 4: LinkedIn Profile Page



As of November 2010, LinkedIn had more than 80 million registered users,

spanning more than 200 countries and territories worldwide (LinkedIn, 2010). However, the US is their dominant market since about 49% of website visits come from the US (Quantcast, 2010). Currently, LinkedIn has 21.4 million monthly unique U.S. visitors and 47.6 million globally (Quantcast, 2010).

LinkedIn is a free SNS for professionals and businesses. Its top market segments include business decision makers, financial service professionals, IT professionals, small medium business professionals and marketing professionals. Since it focuses on these professional segments, more male users visit LinkedIn than female users. The gender difference is 52% of male users vs. 48% female (Quantcast, 2010), which contrasts the demographics of Facebook and Twitter users. LinkedIn attracts older users than does Facebook and Twitter. The top age group is aged 35-49 with 37% of total users, followed by the group of those over 50 with 33% (Quantcast, 2010). However, the common feature among these three SNS is that they all attract a more affluent audience with household income at over \$100K.

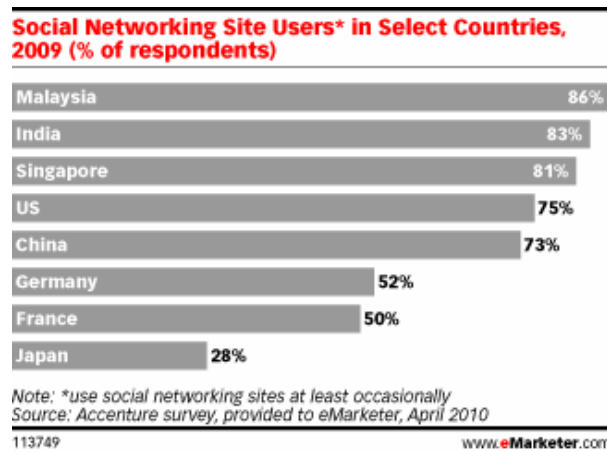
Social Networking Sites in Japan

1. The Overview of Japanese SNS Users

Japan has a longstanding well-developed Internet infrastructure and it ranks the third largest country worldwide based on the number of Internet users. In March 2010, there were 72 million Internet users (eMarketer, 2009) after a 14% increase from March 2009. Social media, traditionally adopted by tech-savvy, younger consumers, seemed like a perfect fit for Japan's highly connected society with high Internet penetration (eMarketer, 2009). However, the outcomes differed from this expectation.

Many reports have found the acceptance of social media in Japan to be slower than anticipated. It is actually near the bottom in social networking penetration compared to global markets and specifically Asian markets. More than 70% of respondents use SNS both in the US and China, while only 28% in Japan (see Table 4) much lower than that in France and Germany. One reason is the majority of online Japanese adults like to read blogs, watch video from other users, and read online forums, etc. rather than to visit SNS. Another important reason behind it is privacy. Japanese users are extremely conscious of their offline and online reputations. For this reason, Japanese social media users are less likely than those in the West to express a strong opinion under their own names. A controversial opinion could elicit a negative response that might cause an individual's social standing to suffer. Even among those people who use SNS, the majority tend to use nicknames and avatars instead of real names and pictures.

Table 4: Social Networking Site Users in Select Countries, 2009



The Japanese social media market has not grown as fast as expected. However, the well-developed mobile market fuels the development of social media market. Japan is the leading market in 3G⁶ due to a 95% penetration, and 85% of customers have data plans (Matrhodes, 2010). In 2008, 75% of social media users in Japan accessed SNS exclusively from mobile phones, while the number accessing SNS only from the PC was a mere 2%. More than 100 million phones in Japan are 3G, about 30 million more than in the United States (Reuters, 2010). Deep penetration of 3G mobile phones in Japan has also helped to keep Japanese SNS ahead of foreign sites such as Facebook that target PC users.

⁶ International Mobile Telecommunications-2000 (IMT—2000), better known as 3G or 3rd Generation, is a generation of standards for mobile phones and mobile telecommunications services fulfilling specifications by the International Telecommunication Union. Application services include wide-area wireless voice telephone, mobile Internet access, video calls and mobile TV, all in a mobile environment.

In general, Japanese SNS users are young. 52% of Internet users ages 18-28 are SNS users, followed by the group aged 29-42 and 43-52 with 28% and 20% respectively (Noble, 2009). Japanese SNS users have high incomes and education. 61% of them are university educated or more, and average annual income is ¥ 5,212,063, or \$64108 (Noble, 2009).

In terms of social activities, Japanese online users preferred blogging (47%) to social networking. Rating and reviewing sites came close behind social networks (26%) (eMarketer, 2009). Forrester found 72% of online Japanese adults are spectators, 35% are creators and 32% are critics⁷.

2. SNS Big Players in Japan

Facebook, Twitter and LinkedIn are growing globally. However, in Japan, domestic SNS dominate the market instead of the US-based popular SNS. Language is the primary reason for Japanese users choosing domestic SNS. Furthermore, Japanese SNS provide more services and applications that better match local users' demands and tastes, for example services compliant with Japanese preferences for mobile access, games and anonymity. The most popular SNS in Japan are Mixi and GREE.

Mixi

⁷ Critics: those who post ratings/reviews of products or services, comment on someone else's blog, contribute to online forums, and contribute to/edit articles in a wiki

Mixi was launched in February 2004. It is one of top social networking sites in Japan (see Figure 5). It has over 20 million registered members in April 2010 (Toto, 2010) and takes around 80% of market share of the social networking market in Japan (Wikipedia, 2010). The Internet penetration is around 75% in both the USA and Japan. However, compared with Facebook which has managed to capture about 37.5% of the American population so far, Mixi's member base of 20 million translates to just 15.7% of the Japanese population (Toto, 2010). The mobile web is integral to the Mixi's growth, as 72% of monthly page views come from mobile phones users (eMarketer, 2009).

To join Mixi, a person needs to be 18 years old and over and also has to be invited by an existing member. The site also requires users to own a Japanese cellphone which bars anyone who is not or has not been a resident of Japan. Thanks to the fact that registrations are by invitation only, Mixi users tend to get a more modulated, mature version of the discussion that frequently occurs on totally anonymous sites.

Like other SNS, Mixi users can send and receive messages, write diaries, read and comment on others' diaries, organize and join communities and invite their friends. Mixi loads extremely quickly because of its simple layout. On Mixi, the user cannot edit the layout of his page. The advantage to this approach is that the site crashes infrequently. The disadvantage to this approach is that there is little variety in the site experience. Mixi differs from Facebook in that it carries with it less connection between offline ("true") identity and online identity: most of Mixi users go by nicknames rather than real

ones. It is also interesting to note that the profile pictures on Mixi are rarely of the page owner. Instead, movie stars, cartoon characters, pets and brand logos seem to dominate. Finally, as opposed to the US SNS, Mixi users can see the most recent visitors to their page.

Figure 5: Mixi Site



Mixi users can rate and review books, CDs, DVDs, games, electronics and other items. Clicking on a product takes you to the relevant page of Amazon Japan. This social commerce idea is compelling and it is something that foreign SNS have not implemented for unknown reasons. Another notable feature is the blogging tool – in addition to writing posts on the site, the user can re-syndicate an external blog on Mixi.

From its advertisement on YouTube and the interface, it is obvious that Mixi prefers to position the site towards female students and young white collar female professionals (GaijinPot, 2010). Unfortunately, there is little detailed information available on the user base of this site..

GREE

GREE focused on mobile services, which fueled rapid growth and established it as the top mobile social network in Japan (see Figure 6). The site began operations at the same time as Mixi. In order to attract more SNS users it opened the social application platform GREE Connect starting April 2010 to integrate more functions of SNS. Similar to Mixi, GREE is also an invite-only service.

Recent news in August showed that Gree has overtaken Mixi to become Japan's most popular social networking site (Reuters, 2010). It has 21.13 million users or about one in six Japanese, by the end of this July, up 56 percent from a year earlier (Reuters, 2010). It is slightly higher than Mixi's 21 million subscribers. GREE obtained a near tripling increase in subscribers within the past two years, mainly because their users flocked to its mobile games (Reuters, 2010). GREE targets mobile game users, primarily young males aged 20-30. This demographic represents 52% of its total user base (GaijinPot, 2010).

The focus on mobile access is a big advantage for GREE, especially in the Japanese market. Many Japanese users preference for mobile social networking led to the dramatic growth of GREE. There were 35 billion GREE page views from cellphones this June, compared with only 400 million from PCs (Reuters, 2010). The ratio at Mixi was 25 billion to 5 billion (Reuters, 2010). Second, GREE offers subscribers free games on mobile phones, which better meets Japanese mobile users' habits. 60% of Japanese

cellphone users prefer playing games via the cellphone. GREE makes about four-fifths of its revenue by selling virtual clothing and accessories that online users buy for their avatars, while most of Mixi's sales come from advertising (Reuters, 2010).

Tanaka, the maker of GREE, announced that they plan to create an English language version and possibly open offices in the US and China. Also, Tanaka intends to bring GREE to iPhone and iPad to attract more young users (GaijinPot, 2010).

Figure 6: GREE Site



3. Foreign SNS Players in Japan

While the local social networks are growing fast in Japan, foreign companies continue to struggle in this market. Only 3% of Japanese Internet users are on Facebook compared with 62% in the US according to Nielsen, which is thought to be because the Japanese prefer not to expose their true identities on SNS even to their friends. As for LinkedIn, work-based social activities have not caught on because job mobility is less

common in Japan. In addition, the product design for mobile access and games are additional reasons why foreign players find it hard to compete with local ones.

However, Twitter is experiencing more success in Japan than foreign SNS. Twitter is seeing the promising increase in Japan since 2009. There are 9 million Japanese Twitter users now and Japan has been regarded as the most valuable emerging market. The proportion of Japanese Internet users who tweet is 16% and now surpasses the ratio among Americans with 10% (Noble S. , 2009). 80% of Twitter users in Japan are male, and most of them access Twitter via the cellphone. Twitter estimates Japanese write nearly 8 million tweets a day, or about 12% of the global total.

Why is Twitter so popular in Japan? The arrival of Twitter's Japanese version in 2008 provided more convenience and better service to Japanese users. Twitter launched the mobile version in Japan in October 2009, further fueling the Twitter boom in a nation where Internet-connected cell phones have been the rule for years. Lastly, Japanese culture places a high value on reputation, so being part of a social context on Twitter without having to be overtly exhibitionist is much more acceptable.

Social Networking Sites in China

Japan has always been regarded by many brands and marketers as the first pitch market in Asia for new products and services. With their experiences in Japan, marketers try to watch and tap into other Asian markets with a similar cultural background, for instance, China. However, in the case of social media, this approach is unlikely to be successful.

1. The Overview of SNS Users in China

China has been the world's biggest Internet market since 2008, reaching about 253 million Internet users as of June 2008 and putting it ahead of the United States with its 220 million (Internet World Stats, 2010). This number increased to 420 million in June 2010 (see Table 5), including over 115 million users in rural areas (Internet World Stats, 2010). In the first six months of 2010, Chinese Internet users increased almost 36 million and the current Internet penetration rate in China is 31.6% is still much lower than that in Japan (78%) and the US (77%).

Unlike Japan, both Internet penetration and 3G smartphone adoption are booming in China. The former is developing widely in small cities and rural areas while the latter is occurring in big cities. Therefore, China is unquestionable the biggest potential market in social networking.

With respect to Chinese active SNS users, China Internet Network Information

Center (CNNIC) reported in 2009 about 46% of Internet users are visiting social websites. As of July 2010, the number of Chinese SNS users hit 210 million, up 19.6% since the beginning of this year, according to CNNIC. According to Forrester in 2008, Chinese SNS users are focusing on youth. 32% of online adults 18-28 years old are SNS users, followed by the group aged 29-42 with 23%. Chinese SNS users are those who have higher education level, high monthly income and higher consumption level (Noble S. , 2009).

Table 5: Internet users and Population Statistics in China

Year	Internet Users	Population	% Popluation
2007	162,000,000	1,317,431,495	12.3 %
2008	253,000,000	1,330,044,605	19.0 %
2009	384,000,000	1,338,612,968	28.7 %
2010 (June)	420,000,000	1,330,141,295	31.6 %

Source: China Internet Network Information Center (CNNIC)

Chinese SNS users prefer to communicate with friends who they know in real life. Almost 80% SNS users are referred by friends, classmates, or colleagues. And 75.8% indicate their SNS friends are friends in real life, according to CNNIC. As for the social activities, Chinese users like to upload photos, write blogs, upload videos, manage a social network profile and use a microblogging service according to eMarketer. Forrester found that in 2008 71% of Chinese Internet users were spectators, followed by critics with 44% and creators with 40%.

2. Big SNS Players in China

Like Japan, the Chinese SNS market is also dominated by local SNS brands. The reason for this situation is because Facebook and Twitter have been blocked in China since July 2009 due to the Chinese government censors. Furthermore, the foreign social networks did not localize their service and failed to catch the users' interest. There are over 100 SNS in China at present (Industry Update, 2010). Google Doubleclick Ad planner found that Renren and Kaisin001 are the top two Chinese SNS based on unique visitors in June 2010.

In early 2010, Sina, the largest Chinese portal website, launched a beta version of a microblog named "Weibo" which is strikingly similar in appearance and functionality to Twitter. According to SIG, the number registered accounts reached 15 million to 20 million in the first half of 2010. It is currently in the testing period and there exists little available market information on it. However, this site will certainly be worthy of more attention in the future.

Renren

Renren, which means "Everyone's Network", was formerly known as Xiaonei ("on-campus network"). It was started in December 2005 by four college students. At the very beginning, it targeted college students with an interface similar to that of Facebook. As of 2008, Xiaonei was China's largest online community website among universities. In 2009, it officially changed its name to Renren and repositioned itself

beyond the student market, launching the first Chinese SNS advertising campaign to urge Chinese to reconnect with old friends and classmates.

At present, students and white-collar workers in the metropolitan area are Renren's main target markets. The company reported it has 120 million users and has been the most popular SNS in China. It occupied 17% of the market share of social network users in 2009 according to CNNIC. 32,000 universities and colleges, 56,000 high schools and 85,000 companies in China as well as 1,500 universities in 29 other countries are available on Renren's confirmation system.

Similar to Facebook, Renren's user interface is simple and easy to use without the advertisements (see Figure7). But it also has unique features, such as a "footprint" of who last visited your page. And recently it added game mechanics so that users can reach 'higher levels' with more functions for interacting on the site (Lukoff, 2010). Renren's users can change profile page "skins" or background, and edit profile music, though the majority of them stay with the basic theme. Activities can be held online by calling on friends to participate. Virtual currency is also available on Renren, which can be used to purchase gifts, exchange for game coins and other usage for not free functions. Perhaps learning from Asian SNS, Facebook also plans to launch its virtual currency program and has already tested it in some Asian markets. The Facebook feature for writing out your thoughts and taking notes (called "Notes") is a poorly-implemented and little-used. However, Renren calls its writing application "log" or "journal" since more

Chinese users like to write journals on SNS and share them with friends. This difference points to a key point: there are cultural differences in how people like to express themselves.

Figure 7: Renren profile page



Compared with other local SNS, RenRen provides the most and best games, in large part due to its open platform, while other networks often copy the popular games on Renren. Renren is fast moving in developing advertising, gaming, and e-commerce revenues (Lukoff, 2010), and is more likely to become into the SNS giant in China.

Kaixin001

Kaixin001 was launched in March 2008, which means “Happy Net” in Chinese. While Renren was focusing on college students, Kaixin001 appealed to white-collar office workers in big cities with a simpler user interface. It has over 75 million users currently, and ranks as the 13th most popular website in China in 2010 (Wikipedia, 2010). CNNIC reported that Kainxin took 12% of market share in 2009. Its success can

be partly credited to the government blockage of some foreign SNS in 2009. After that, many Chinese users turned to domestic social sites and promoted Kaixin001 to be the most active SNS in China with highly active users.

Compared with Renren, Kaixin001's users love surfing the site at work and sometimes during their free time. So, its users are highly addicted to social games on Kaixin001, such as parking cars, stealing crops, and other popular games (Lukoff, 2010). And they are more active than other SNS users since they spend twice as much time on site (Lukoff, 2010). In addition, Kaixin001's target users are the richest among all Chinese social network users.

Similarly, the interface of Kaixin001 is clean and simple with minimal advertising (see Figure 8). Post-forwarding is extremely popular: celebrity gossip, cute photos, or funny stories routinely receive many thousands of rating and forwards. Besides the common functions of SNS, it is best known by its addictive online games. It was Kaixin001 that brought the most popular Facebook applications to the Chinese market before anyone else. But its games now lag behind RenRen in quantity and quality, because it is attempting to develop everything in-house (Lukoff, 2010).

With the rapid development of Renren, the big challenge for Kaixin001 is how to ensure the next generation of students transfers to their site upon entering the workforce, rather than remaining with RenRen. Also, they need to invest more resources in developing new features and games, to hold the solid market share.

Figure 8: Kaixin001 Profile Page



3. Foreign SNS Players in China

Facebook and Twitter have been blocked in China due to government censorship. LinkedIn is accessible in China but few people know it because of lack of Chinese version site and no local promotion effort. Maybe the Chinese market is not their main target now. However, it seems Facebook is attempting to actively understand the most promising mode of entry into the Chinese market.

Mark Zuckerberg, the CEO of Facebook, said recently, “China is extremely complex and has its own dynamics”, and Facebook is taking the time to make sure they approach the world’s most populous country with the right strategy (Kincaid, 2010). Previous unconfirmed news disclosed that Facebook is expected to enter China by the end of 2010 as a partner for the big local social network, and the lastest news said Zuckerberg is planning a two-week trip to China in December. However, Facebook

spokesperson declined to discuss whether Zuckerberg would be traveling to China in the near future.

Comparison and Summary of SNS Features in the US, Japan and China

Overall, there are some similarities and differences among the three markets, although all of them are growing on the SNS market. Being aware of these will help SNS players to ensure their strategies are right for entering foreign markets, and also bring useful cultural understanding for marketers to work on their social media marketing tactics.

1. SNS market Size and penetration

Table 6: The Penetration of Internet and SNS Usages in the US and China

Country	Population in 2010	IU ⁸ in 2010	Pop. in 2009	IU in 2009	SNS Users in 2009
USA	310.2 million	77% of Pop.	307.2 million	74% of Pop.	61% of IU
Japan	126.8 million	78% of Pop.	127 million	74% of Pop.	36% of IU
China	1,330 million	32% of Pop.	1,338 million	29% of Pop.	46% of IU

Sources: Internet World Stats, CNNIC, Symantec, and Mintel

All of these three markets see a 3%-4% increase in Internet penetration rate based on a country's population in 2010 (see Table 6). Japan is taking the leading position in Internet usage with 78% of total population in 2010, slightly higher than the US (77%). China has the lowest percentage of Internet users, only about 32% of the population. However, due to its large population base, China owns the largest market in Internet

⁸ IU refers to Internet users here and is calculated by % of the population

usages with 426 million Internet users, compared to the US (238 million) and Japan (98 million).

As far as SNS users are concerned, the data in 2009 (see Table 6) indicates that China is still the largest market with 178 million SNS users, compared with the US (138 million) and Japan (33 million). In terms of SNS usage, the US as expected is the market with the highest SNS penetration (61%) because SNS was created and developed there first. However, surprisingly, Japan with the highest Internet coverage rate has the lowest percentage (36%) of SNS users, even behind China by 10%. It might be highly related to the Japanese market's low trust of SNS. In Japan, few people use real names on SNS, which leads to a difference between social activities in "real life" and their day-to-day public personalities.

2. Big Players

Facebook and Twitter have already grown into the well-known global social networks, but they lag far behind the local players both in Japan and China. Language is one of the reasons to explain this outcome. SNS users are more confident communicating with each other in their native language, because native language sometimes is more appropriate to express their feelings and humor. For example, "可爱" in Chinese means "cute", but another, newer definition among the young people is "so poor because of not being loved"; "表" in Chinese originally translate to "watch", on SNS the term translates as "don't". Another reason for US-based SNS

failing in Japanese and Chinese markets is that they are not familiar with the local usage habits, also known as “localizing” their products. This situation did not only occur with SNS brands; similar stories happened in China before including the failure of eBay, Amazon and Google. “People like to blame regulations for the failure of businesses in China, but the truth is that it is more the American corporate culture that is the reason,” said J.P. Gan, a partner at Qiming Ventures (Reuters, 2010).

3. Anonymity and Identification

The impressive success of Facebook depends on its trusted network where users identify their friends with real names, pictures, and classmate or colleague relationship, as opposed to nicknames or avatars. This trump seems to work well in some markets, for example, China. Chinese users used and are still using nicknames and avatars at online forums which appeared before SNS. However, with the influence of SNS like Facebook and Renren, there is a change that happened to Chinese users’ attitude and usage on SNS. Most Chinese users use real names and personal information on SNS. Even on micro-blogs like Sina Weibo where identification is unnecessary, Chinese users still do the same thing.

However, in Japan the situation is drastically different. Most Japanese do not participate in social networking under their real names, even with friends. Less than 5% of Japanese social networkers use photos of themselves for their profiles (Aah, 2008). Anonymity is a part of the culture in Japan and tends to the role on popular Japanese

SNS. Japanese people really care about their reputation or “face”. The opinion expressed under a real name on SNS could bring out a negative response from the public. Even users who have high amounts of social capital in Japanese SNS still use pseudonyms. They might worry that their ‘internet personality’ will be identified by offline friends or colleagues (Borders, 2009). Personal branding is not a major interest for Japanese people. The direct result of an anonymity culture in Japan is that Japanese do not trust information or friends on SNS as much as American and Chinese users.

4. SNS Mobile Access and Applications

Mobile access has been another important factor in promoting SNS in these three markets after the PC. More than users in the US and China, mobile applications are the preferred method of interaction for Japanese SNS users. In 2008, 75% of social media users in Japan accessed SNS exclusively from mobile phones, while only 2% accessing SNS from PC. Twitter obtained a 428% increase in Japan over 2009, largely relying on its release of the mobile version in Japan.

The Japanese mobile market is the most highly developed market in the world and mobile applications are everywhere in Japanese life. 3G penetration have reached 95% of mobile users, and 85% of customers have data plans, which drove the huge adoption of mobile Internet usage. Additionally, the fierce competition in this mature market inhibits fast-moving innovations in the mobile marketing space. Many advanced technologies related to mobile marketing appeared in Japan ahead of other countries. For example,

picture messaging, Mobile Flash, GPS and NFC⁹, all originated in Japan and then trickled down to other markets. For Japanese users, a mobile phone is used not only for Internet access and e-mail communication but also as credit card-type functions, boarding passes, and even body-fat calculators. Therefore, SNS must exist on mobile platforms in Japan.

5. Other Features

There are three more features with different character in these markets. Social gaming on SNS is spearheaded by Japan due to its mature social game market and huge base of gamers. 70% of GREE's quarterly revenue stemmed from paid content and in-game purchases. This June the company imported 40 third- party games from traditional players as well as Chinese developers. The model of Japanese SNS games provides a good example for the US and China to learn from because gaming has become a significant opportunity for SNS to increase the user interaction as well as the profits. Another characteristic is blogging. Few Facebook users write blogs in the US. However, Chinese and Japanese are more likely to write and read blogs, especially in China. It might be related to their high context culture. It is worth mentioning that "blogs" on Chinese SNS are referred to as "diaries". Forrester also found that 40% of Chinese SNS users publish a blog, compared with US (23%) and Japanese users (35%). Finally, Chinese SNS prefer using "score system" to indicate the level of users' loyalty or

⁹ NFC, or Near Field Communication, is a short-range high frequency wireless communication technology which enables the exchange of data between devices over about a 10 centimeter (around 4 inches) distance.

interactivity frequency, which is rare in the US. Actually it provides valuable information for SNS players and those brands housed on SNS, and offers an effective method to differentiate SNS users by their activities.

To sum up, SNS markets differ by region due to the technology development and culture differences. The Chinese SNS market is not easy to enter because of the government censorship but it has the greatest development potential considering it is an unsaturated market and that it is a trusted platform. Japan stands out on mobile access and social games on SNS. Anonymity is another unique feature in Japanese SNS. Asian users are more likely to write and read blogs on SNS, particularly in China. As for the US, its SNS market is more mature, well-developed on business SNS usage, and has more SNS with global influence.

Marketing Implications

SNS have been one of the most important marketing channels of many businesses' integrated marketing strategies, because using SNS is cheaper than traditional advertisement, more effective for building direct relationships with consumers, and highly influential on purchasing decisions. The comparative analysis among the U.S., Japan, and China provides great insights for global marketers and international advertisers.

The implementation of social media marketing in Japan and China is challenging, but extremely worthwhile. The Chinese SNS market is censored by the government, so local SNS might be the better choice for global marketers. The Japanese market, with high Internet penetration, has much lower rates of SNS adoption; but mobile Internet access is driving new users to join SNS. SNS are growing and changing so rapidly that there is no time for marketers to wait for ideal opportunities. Actually, Japan and China provide more opportunities for global social media markets than the U.S. does, because there is less brand competition in those countries. Thus, brands that take advantage of opportunities will gain valuable experience and information for future implementation.

Second, SNS users are desirable potential consumers for brands that target young people, people with high levels of education, and people with purchasing power. However, the question of how to increase the lead generation, promote conversation with targeted SNS users, and meet their needs must be addressed. As discussed before,

Chinese and Japanese SNS users like to read blogs; responding to this trend, global marketers can publish blogs and product information on SNS, thereby keeping their followers informed and promoting engagement with them. Similarly, Chinese SNS users like to share their product usage experiences and ratings on SNS; social media marketers in the U.S. can use this to their advantage. For example, global marketers can provide special discounts or free trials for their fans and encourage them to post their usage experiences on SNS. The marketers can respond to their and their friends' comments, make modifications, and in doing so both improve their marketing and cultivate brand ambassadors. As for the Japanese market, marketers have to consider how they might utilize mobile access and applications during social media marketing to attract SNS followers. Developing social games is also a good opportunity for brand marketers as a means of increasing SNS users' engagement, but such games need to suit mobile users in terms of convenience and interest, particularly in Japan.

Selling advertisement space is the most common way for SNS to make profits. However, marketers need to understand users' attitudes towards advertisements featured on SNS. Most Chinese users are not interested in banner advertisements on SNS, because for them, SNS are places to communicate with friends. However, American users have neutral attitudes toward Facebook ads, and are more likely to click on them for more information. Some brands offer special coupons for SNS subscribers. These are popular in the U.S., and they might work well for SNS users in China—for example,

coupons for group buying. Also, selling branded virtual gifts and game accessories on SNS is a good soft-selling way to promote brands in Japan and China, as in those countries, SNS users buy virtual gifts and game accessories with real currency.

In conclusion, global social media marketing strategies are extremely important for marketers of multinational brands to understand and utilize. However, localization is crucial for plan execution due to the different countries' varying cultural and technological situations. Global marketers and International advertisers should tap into SNS user behaviors in target markets and gain knowledge of their attitudes toward different SNS and various businesses' implementation of SNS. Some of the success of social media marketing in the U.S. market might be copied to the Chinese market; strategies that work in the U.S. might work more easily in China than in Japan. The Chinese market has more potential in social media marketing, but marketers should not be too pushy with their SNS advertising strategies, because SNS for Chinese users provide trusted methods of communicating and sharing with friends. Global marketers can consider using the popular "score system" in China, wherein SNS grade users' social activity frequency by different levels, so that companies might classify and position their SNS fans for future communicating strategies. As for the Japanese market, SNS users there do not like to share their personal information. Certain types of business social media marketing might increase these users' distrust of SNS. However, to attract Japanese users, global marketers can emphasize social media marketing on mobile

access, as well as investing in branded or unbranded social gaming applications. In turn, these insights can be applied to the U.S. market based on the needs of brands.

Conclusion

Overall, this comparative analysis explores that SNS are taking over the globe at an incredible speed. However, local and regional SNS markets have their own characteristics and dynamics. Most surprisingly, Japanese and Chinese markets are extremely different, even though the two countries are geographically close and share similar cultural backgrounds. On the other hand, it seems that SNS users and user patterns are very similar in the U.S. and China. When global marketers consider global marketing or other social media marketing strategy, in addition to taking into account the overall global perspective, they have to leave enough authorities and space for local marketers and allow diversity of plan execution based on their regional submarkets.

Limitations and Future Research

There are some limitations in this report. The SNS industry is growing so rapidly that the data of even one to two years ago already seems outdated. The latest and most recent information must be understood to discuss up-to-date insights for social media marketers. Also, the data of mobile SNS users as well as SNS mobile applications is worthy to collect for future study because mobile innovation is the key to advancing the SNS industry, help SNS players to make profits, and guide brand marketers to create new branding channels.

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